



The Write Will Service
www.writewills.co.uk
01702 713155

GIVING YOUR INSTRUCTIONS

PLEASE READ CAREFULLY BEFORE COMPLETING

1. You can complete this form yourself or with help from your Will Writing service. Please use BLOCK CAPITALS throughout. Do not use county abbreviations. Identify all people by their full names (surname last)
2. Circle your choice for YES / NO questions. Put a line through any sections that do not apply to you. Use " marks for partner information which is identical to yours.
3. Additional legacies and other information can be listed on a supplementary sheet. Please indicate clearly which section of this form will include any additional information.
4. The DECLARATION on page 4 must be signed and completed before your application can be processed.

Instructions for preparing a single Will (First Testator only)

Instructions for preparing 'mirror' Wills (First Testator and Spouse/Partner)

(1) Testators

The Testator is the person making the Will. Write in your full name and surname (last). Your address (at the time of making the Will) also helps to identify you.

Full Name of First Testator		Date of birth
		MALE / FEMALE
Address		Are you blind or physically infirm? <input type="checkbox"/>
<hr/> <hr/> <hr/>		

Mirror Wills refer to 'husband' or 'wife', or 'partner' or 'fiancee' according to the relationship indicated here.

Spouse / Partner / Fiancee (Full Name)		Date of birth
		MALE / FEMALE
Relationship	Spouse / Partner / Fiancee	Are you blind or physically infirm? <input type="checkbox"/>

Do not choose 'Yes' unless a wedding is definitely booked with the next 12 months

Are you about to marry?	If so, what is the wedding date?
Yes / No	

(2) Executors

Executors do the work of administrating your Estate and carrying out other instructions in your Will. Appoint people you trust to comply with your wishes.

Even if a spouse or partner is chosen as a sole Executor, others may be appointed as reserve Executors.

Executors are also appointed as 'Trustees' which may involve long term management e.g. looking after money for minor children.

A **maximum of 4** Executors are allowed to administer an Estate when a Will has to be proved.

Do you wish your spouse/partner to be an Executor?

Yes solely / Yes jointly with executors listed below / No / Not applicable
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Executor name (1)		Relationship to:	
	First Testator	Spouse/Partner	

Executor Address (1)			
<hr/> <hr/> <hr/>			

Executor name (2)		Relationship to:	
	First Testator	Spouse/Partner	

Executor Address (2)			
<hr/> <hr/> <hr/>			

Executor name (3)		Relationship to:	
	First Testator	Spouse/Partner	

Executor Address (3)			
<hr/> <hr/> <hr/>			

Charges & Fees

Executors may also be beneficiaries but they cannot charge for their work unless they have accepted the appointment in a professional capacity e.g. as an Accountant or a Solicitor.

Will any of the Executors be acting in a professional capacity?

Yes / No

(3) Guardians

Appoint people who will look after minor children (under 18) after the death of both partners. Choose people who will be acceptable to both sides of the family.

Guardian name (1)	First Testator	Relationship to: Spouse/Partner
Guardian Address (1)		
Guardian name (2)	First Testator	Relationship to: Spouse/Partner
Guardian Address (2)		

(4) Legacies

(a) Specific items

Identify items as carefully as possible e.g. 'My 1972 gold Rolex watch'. If you wish to give a general possession which may be regularly changed, write something like 'Any motor car owned by me at the time of my death'

Tick the boxes if you want the legacy to be given only if your spouse or partner has died before you.

From First Testator	From Spouse/Partner
Recipient (1)	Recipient (1)
Relationship	Relationship
Details of gift	Details of gift
Give only after second death? <input type="checkbox"/>	Give only after second death? <input type="checkbox"/>
Recipient (2)	Recipient (2)
Relationship	Relationship
Details of gift	Details of gift
Give only after second death? <input type="checkbox"/>	Give only after second death? <input type="checkbox"/>

(b) Gifts of Money

These gifts are usually paid free of tax calculations i.e. Inheritance Tax is paid from the Residuary Estate and the recipient is paid the whole amount shown.

Use this section to gift the contents of bank accounts, stocks, shares or any part of your estate that may be subject to tax calculations. Give details of account and certificate numbers.

Tick the boxes if you want the legacy to be given only if your spouse or partner has died before you.

From First Testator	From Spouse/Partner
Recipient (1)	Recipient (1)
Relationship	Relationship
Details of gift	Details of gift
Give only after second death? <input type="checkbox"/>	Give only after second death? <input type="checkbox"/>
Recipient (2)	Recipient (2)
Relationship	Relationship
Details of gift	Details of gift
Give only after second death? <input type="checkbox"/>	Give only after second death? <input type="checkbox"/>

(c) Goods/Chattels

Personal possessions (house contents etc.) given separately from the Residue

Recipient(s) of Goods & Chattels

(5) Residue Main Beneficiaries

The 'Residue' is everything left in your Estate after debts and any legacies have been paid.

You can leave everything to your spouse or partner but if they do not survive you by 30 days your Estate can pass to your children (or grand-children) or to other named beneficiaries.

A standard family Will often only requires 'Yes' to be circled in the first two choices on this page.

If you have a young family leave the 'Child name' boxes blank - this will allow for further children being born without having to amend your Will. If the children in your family have come from more than one partnership it is best to name them (with relationships like 'step-son') to indicate exactly who is to be included. Write full names of children and their present surnames.

If you are single, do not have children or wish your Estate to pass other friends/relations, ignore the Children section and use the Named Beneficiary section instead. The share they are to receive can be written as a percentage (e.g. 35%) or as a fraction (e.g. 1/4). If the Share box is left blank, they will receive equal shares of your Estate. Charities may be named in this section.

In case all your previous beneficiaries fail to survive you, Reserve Beneficiaries can be named. Charities may be named as well as people in this section.

Residue of Estate to pass firstly to Spouse/Partner

Yes / No / Not applicable

And/Or then to pass onto Children and Grandchildren (including those not yet born)

Yes (children may be listed)

No - Estate to pass to named beneficiaries

No further beneficiaries

Turn to section 6.

Children as beneficiaries

Child name(1)	Relationship to: Testator Spouse	
<input type="text"/>	<input type="text"/>	<input type="text"/>
Child name(2)	Testator	Spouse
<input type="text"/>	<input type="text"/>	<input type="text"/>
Child name(3)	Testator	Spouse
<input type="text"/>	<input type="text"/>	<input type="text"/>
Child name(4)	Testator	Spouse
<input type="text"/>	<input type="text"/>	<input type="text"/>

Are all children over the age of 18 years? Yes / No

Named beneficiaries

Beneficiary name(1)	SHARE	Relationship to: Testator Spouse	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Beneficiary name(2)	SHARE	Testator	Spouse
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Beneficiary name(3)	SHARE	Testator	Spouse
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Beneficiary name(4)	SHARE	Testator	Spouse
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Reserve beneficiaries if distributions above fail entirely

Reserve Beneficiary name(1)	SHARE	Relationship to: Testator Spouse	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Reserve Beneficiary name(2)	SHARE	Testator	Spouse
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

(6) Other Information

Exclusions

Name people who may claim they have been excluded as an oversight. Indicate if exclusion is mutually agreed.

Have you deliberately excluded anyone who may have a possible claim on your estate?

First Testator	Spouse / Partner

Business

Sole traders and partnerships which may be continued by beneficiaries. Shares in a Limited Company should be given as legacies.

Do you have any business interests which may form part of your estate?

First Testator	Spouse / Partner

Medical Donation

An expression of a wish to reinforce the intentions declared by carrying a Donor Card.

Do you wish your organs to be used for transplant purposes?

First Testator	Spouse / Partner
Yes / No	Yes / No

Funeral Requests

Requests can be recorded in your Will but friends, relations and executors should also be informed separately.

Do you wish to specify funeral arrangements?

First Testator	Spouse / Partner
None / Burial / Cremation	None / Burial / Cremation

↓

Church/Crematorium
Village/Town
Parish/County

↓

Church/Crematorium
Village/Town
Parish/County

Funeral expenses paid by relatives or prepayment plan?

Date of Signing

Can remain blank. This will be used for written records after completion.

Date of signing Will

(7) Trustee Powers

Your Executors (who also act as Trustees) need to be given additional powers to carry out your instructions as you would wish. Standard Trustee Powers are included in all Wills unless alternatives are specifically requested. Stated powers that do not apply to your estate at present can be included as safeguards to allow for a future change

Executors and Trustees have power to:

- Invest money appropriately
 Advance money to minor children
 Pay fees to professionals
 Substitute gifts by agreement with beneficiaries
 Treat all income to the estate as being earned after death
 Insure property in the normal way
 Have funds not taxed disadvantageously as trusts
 Pass the estate to the next beneficiary if any do not survive the testator by 30 days

Declaration to be signed by Testator(s)

I/We confirm that I/we am/are over the the age of 18 years and am/are of sound mind. The information given on this form is complete and correct and is to be used as the basis for preparing my/our Last Will and Testament. In addition to appointments, legacies and distribution of residue I/we agree to my/our Executors and Trustees having normal powers to aid the administration of my/our Estate(s). I/We know of no other Trusts or constraints which would prevent my/our Estate(s) being distributed as I/we have requested.

Dated: _____ 1st Signature _____ 2nd Signature _____

Payment by: Cheque £ _____

Additional Information — Section (4) Legacies

Legacies

Legacies are specific items or sums of money given SEPARATELY from the main distribution of the Residue.

Use this form only if there is insufficient space for legacies on the main form

For **Specific Items**, identify as carefully as possible e.g. 'My 1972 gold Rolex watch'. If you wish to give a general possession which may be regularly changed, write something like 'Any motor car owned by me at the time of my death'

Gifts of Money are usually paid free of tax calculations i.e. Inheritance Tax is paid from the Residuary Estate and the recipient is paid the whole amount shown.

You can also gift the contents of bank accounts, stocks, shares or any part of your estate that may be subject to tax calculations. Give details of account and certificate numbers.

Tick the boxes if you want the legacy to be given only if your spouse or partner has died before you.

From First Testator

From Spouse/Partner

Recipient (1)	Recipient (1)
Relationship	Relationship
Details of gift	Details of gift
Give only after second death? <input type="checkbox"/>	Give only after second death? <input type="checkbox"/>
Recipient (2)	Recipient (2)
Relationship	Relationship
Details of gift	Details of gift
Give only after second death? <input type="checkbox"/>	Give only after second death? <input type="checkbox"/>

Recipient (1)	Recipient (1)
Relationship	Relationship
Details of gift	Details of gift
Give only after second death? <input type="checkbox"/>	Give only after second death? <input type="checkbox"/>
Recipient (2)	Recipient (2)
Relationship	Relationship
Details of gift	Details of gift
Give only after second death? <input type="checkbox"/>	Give only after second death? <input type="checkbox"/>

Recipient (1)	Recipient (1)
Relationship	Relationship
Details of gift	Details of gift
Give only after second death? <input type="checkbox"/>	Give only after second death? <input type="checkbox"/>
Recipient (2)	Recipient (2)
Relationship	Relationship
Details of gift	Details of gift
Give only after second death? <input type="checkbox"/>	Give only after second death? <input type="checkbox"/>

IHT Estate Planner

Name

Date

	Self	Partner	Joint	Notes
Fixed Assets				
House				
2 nd property				
Contents				
Valuables				
Vehicles				
Business Assets				
Other				
Total fixed				
Liquid Assets				
Current A/C				
Savings A/C's				
PEP's / ISA's				
National Savings				
Investment Bonds				
Unit Trusts				
Shares				
Other				
Total liquid				
Total Assets				
Liabilities				
Mortgages				
Loans				
Credit Cards				
Other				
Total liabilities				
Net Estate				
Life Assurance				
Estate value				